

# Recognition Programs

## TRAINING MANUAL

Includes:

- Recognition program requirements
- View recognition programs on a constituent record
- View a recognition program's criteria and list of donors

Version 2.0  
Summer 2019

# Ali CRM

The software referred to as Ali “al-ee” CRM derives its name from the Greek word **Aletheia** “al-uh-**thee**-uh”, the Greek goddess of truth. The intention is to ensure Ali CRM is the single source of truth about advancement activities that benefit the University of Nebraska.



Ali CRM gives those who work in advancement – including efforts such as **fundraising, alumni relations, marketing and communication** – the ability to manage the relationships and interactions with alumni, donors and friends. Ali CRM has many features to help users navigate, access and share information, and provides a 360-degree view of the university’s advancement constituents, allowing users to provide a customized, consistent experience for each alumnus or friend of the university.

## NU Foundation Funds Online

NUFFO, pronounced “**new**-foe” is part of Ali CRM. The NUFFO portal provides fund and gift information to authorized users. The foundation cannot share specific gift amounts for donors in Ali CRM. Why? The university is subject to public records laws, and providing access to this information via the Ali CRM database or other paper or electronic records makes gift information subject to disclosure by the university as a public record.



Ali CRM + NUFFO users include affiliated partners from:

- The University of Nebraska
- The University Alumni Associations
- The University of Nebraska Foundation
- Nebraska Medicine

Ali CRM is the single source of truth for supporters of the University of Nebraska.

# RECOGNITION PROGRAMS MANUAL

**FOR UNIVERSITY PARTNERS**

***V2.0 SUMMER 2019***

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*Note about the table of contents:* In its electronic format, navigation within this document may be swiftly accomplished by clicking the hyperlinked sections listed above. Depending upon your software, you may need to hold down the CTRL key while clicking. Even-numbered page footers throughout the document contain a hyperlink returning you to this table of contents.

# RECOGNITION PROGRAM(S)

**Recognition programs are a way to recognize donors based on their giving history, and they often help us understand more about a donor's affinity for a particular area of the university system.** Information about recognition programs may be found on individual or organization constituent records. On a constituent record it is possible to view information about the program(s), how long the constituent has been a member of the program(s) and the renewal date (if applicable, for annual societies). Within Ali CRM it is also possible to view all recognition programs and the qualification criteria and qualified donors for each program.

## Lesson Objectives

After you complete this lesson, you will be able to:

- Identify Recognition Program requirements;
- View a constituent record and determine recognition program(s) to which they belong or have declined membership; and
- View a list of recognition programs, qualification criteria and a list of members for each program.

## Recognition Program Requirements

Recognition Program Name	Managed by UNF Donor Relations	Requirements
Nebraska Circle	X	\$1M or more through outright gifts, pledges or qualifying planned gifts
President’s Society	X	\$100,000 to \$999,999 in outright giving across the University of Nebraska
UNK/UNL/UNMC/UNO Chancellor’s Society	X	\$50,000 or more in outright giving to a particular campus
Burnett Society	X	Named the foundation in estate plans; no minimum amount
Annual Leadership Society	X	\$1,000 cumulative giving in a calendar year
Dental Dean’s Club		\$10,000+ in giving to the UNMC College of Dentistry
UNL Library Dean’s Club		\$5,000+ in giving to the UNL Library
UNMC College of Medicine Edward A. Holyoke Society		Physicians with \$100,000+ in giving to the UNMC College of Medicine
UNO CBA Lucas Society		\$100,000+ in giving to UNO College of Business
UNO Accounting Club		Donors to UNO Accounting, by fiscal year

Individual constituents and organizations may qualify for participation in one or more recognition societies. Once a constituent qualifies, participation in a recognition society is optional. Upon meeting qualification criteria for any recognition society, the opportunity to opt out is provided to the constituent. If the constituent does not notify the foundation that they decline membership by the provided date on their invitation, their membership begins by the end of that month. All University of Nebraska Foundation Recognition Programs offer lifetime membership, so once a constituent is a member, they remain in that club unless they request otherwise.

### View a Recognition Program on a Constituent Record

1. Open the constituent’s record.
2. Click the **Revenue** tab.
3. Click the **Recognition** sub-tab.

# RECOGNITION PROGRAMS

4. View the constituent's program(s) participation in the **Recognition programs** frame.

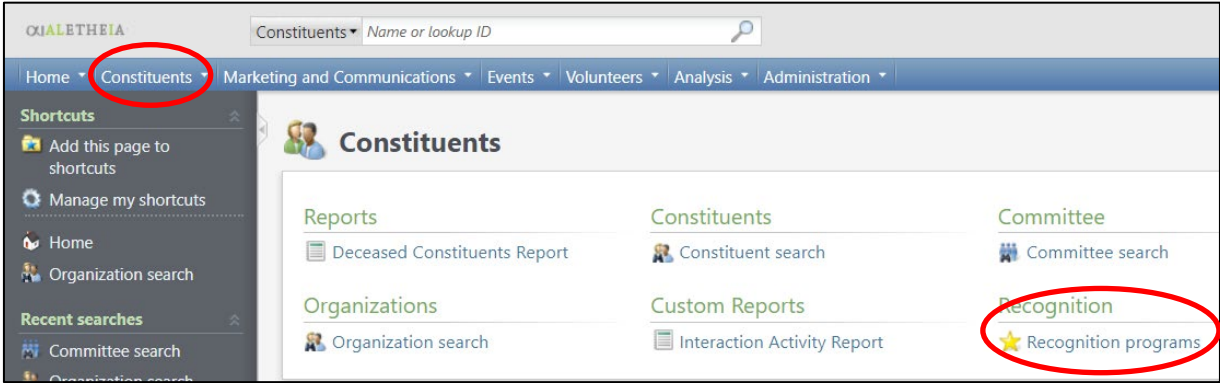
Program	Level	Member since	Status
Annual Leadership Society	Annual Leadership Society	10/27/2016	Lapsed
President's Society	President's Society	12/31/2005	Active
UNL Chancellor's Society	UNL Chancellor's Society	12/31/2005	Active
Nebraska Circle	Nebraska Circle	12/7/2007	Active

- a. The **Status** column provides information about a constituent's participation in the recognition society:

Status	Description
<b>Active</b>	Constituent is a current member of the program.
<b>Dropped</b>	Constituent declined to be in the program: a former member, removed per their own request or removed per a UNF employee request.
<b>Lapsed</b>	Constituent is no longer a member of the program. This only applies to programs with an expiration date, such as the Annual Leadership Society.
<b>Pending</b>	Do <i>not</i> contact as a member of the program; constituent's acceptance of this recognition program is pending.

# View a Recognition Program’s Criteria and List of Donors

1. Click on the **Constituents** functional area in the [blue navigation bar](#) at top.



2. Click **Recognition programs** link.
3. View the list of all recognition programs and the criteria required to be eligible for each.
4. Click the blue hyperlinked name of the recognition program to drill down for more information.

**★ Recognition Programs**

Recognition programs (13) [+ Add](#) [Filters](#) [More](#)

Name	Description	Type
<a href="#">Annual Leadership Society</a>	\$1,000 cumulative giving in a calendar year. Renewed and updated every January.	Annual giving
<a href="#">Burnett Society</a>	Named the foundation in estate plans; no minimum amount. Updated monthly.	Lifetime giving
<a href="#">Dental Dean's Club</a>	\$10,000 or more in giving to the UNMC College of Dentistry. Updated annually.	Lifetime giving
<a href="#">Nebraska Circle</a>	\$1M or more through outright gifts, pledges or qualifying planned gifts. Updated monthly.	Lifetime giving
<a href="#">President's Society</a>	\$100,000 to \$999,000 in outright giving across the University of Nebraska. Updated monthly.	Lifetime giving
<a href="#">UNK Chancellor's Society</a>	\$50,000 or more in outright giving to UNK. Updated monthly.	Lifetime giving
<a href="#">UNL Chancellor's Society</a>	\$50,000 or more in outright giving to UNL. Updated montly.	Lifetime giving
<a href="#">UNL Library Dean's Club</a>	\$5,000 or more in giving to the UNL Library. Updated annually.	Lifetime giving
<a href="#">UNMC Chancellor's Society</a>	\$50,000 or more in outright giving to UNMC. Updated monthly.	Lifetime giving
<a href="#">UNMC College of Medicine Edward A. Hol...</a>	Physicians with \$100,000 or more in giving to the UNMC College of Medicine. Updated annually.	Lifetime giving
<a href="#">UNO Accounting Club</a>	Donors to UNO accounting by fiscal year. Renewed and updated annually.	Annual giving
<a href="#">UNO CBA Lucas Society</a>	\$100,000 or more in giving to the UNO College of Business. Updated annually.	Lifetime giving
<a href="#">UNO Chancellor's Society</a>	\$50,000 or more in outright giving to UNO. Updated monthly.	Lifetime giving

# RECOGNITION PROGRAMS

5. A summary of the recognition program appears in the upper portion of the record. The lower portion of the record contains the details. Click the **Recognized Donors** tab to view all past, current and future (qualified but pending acceptance) donors.
6. Optional:
  - a. Click the **+Columns** button to add additional columns to the data list, for example: **Deceased**.
  - b. Click the **More** button if your work requires you to download and export the list as an XLSX or CSV spreadsheet. The foundation's data use and protection policies still apply, and the file should be permanently deleted as soon as its intended use is complete.
  - c. The best practice for most users is to set the filters to include only active members who are not deceased.

The screenshot displays the ALETHEIA CRM interface for the 'Annual Leadership Society' recognition program. The 'Recognized Donors' tab is selected and highlighted with a red circle. Below the tab, there is a search bar and a 'More' button, also highlighted with a red circle. A table of donors is shown with the following columns: Name, Level, Date achieved, Amount to next level, Status, Deceased, and Gives anonymously. The table contains three rows of data:

Name	Level	Date achieved	Amount to next level	Status	Deceased	Gives anonymously
Mrs. Bo Peep	Annual Leadership Society	3/14/2018		Lapsed	No	Yes
Mrs. Bo Jangles	Annual Leadership Society	2/20/2017		Lapsed	No	Yes
Mr. Bo Duke	Annual Leadership Society	10/4/2017		Lapsed	No	Yes